ENTERING PERSON AND PROVIDER NAMES INTO CAPS

NEWS FLASH...Little typographical movements cause BIG trouble

An area of inconsistency surfaced when we began CAPS that deals with the manner in which the names of persons and/or providers are being entered into CAPS. This memo is intended to bring consistency to the manner of person and provider entry.

While some of the practices which will create consistency may seem silly or stupid, the difference in a CAPS users entry of a person, first name last or last name first, with spaces or without spaces, or with or without punctuation marks can make the difference in where, or even if, you will find the person or provider you are looking for in your search.

Please adhere to the following practice when doing person or provider entry:

1.   BE CERTAIN that you are at the BEGINNING of the field when you type in the persons/providers name and the providers abbreviated name. Using the tab key will ensure you are at the beginning of the field. Some users have inadvertently spaced and then entered the person name*.*

RIGHT…   LAST NAME:HOLLING
                 FIRST NAME:PAULA
WRONG…   LAST NAME: HOLLING
                 FIRST NAME:PAULA

The wrong entry (with the initial space) will cause HOLLING PAULA to be at the beginning of the person name list (PERL).

The result is:
  HOLLING, PAULA
ALBERTSON, JOE
ANDERSON, SUSAN

The same problems can result when entering provider names.

RIGHT…   PROVIDER NAME:CASEY FAMILY PROGRAM INC
WRONG…   PROVIDER NAME: CASEY FAMILY PROGRAM INC

The wrong entry (with the initial space) will cause CASEY FAMILY PROGRAM INC to be at the beginning of the provider name list (PROL).

The result is:
CASEY FAMILY PROGRAM INC
ALBERTSONS INC
ALLISON, FRED AND NANCY

2. When entering a provider/person name, enter LAST NAME FIRST(space)(NO comma)FIRST NAME LAST.

RIGHT…   PERSON NAME:HOLLING PAULA
WRONG…   PERSON NAME:PAULA HOLLING

3. DO NOT use any punctuation marks ever, ever, ever in either the person name or AKA name fields.

RIGHT…   LAST NAME:HOLLING ANDERSON
          FIRST NAME:PAULA
WRONG…   LAST NAME:HOLLING-ANDERSON
          FIRST NAME:PAULA

RIGHT…   LAST NAME:OTOOLE
          FIRST NAME:MARGIE
WRONG…   LAST NAME:O TOOLE
          FIRST NAME:MARGIE

RIGHT…   LAST NAME:ST JAMES
          FIRST NAME:HENRY
WRONG…   LAST NAME:ST. JAMES
          FIRST NAME:HENRY

The same rules apply to entering provider names and provider abbreviated names.

RIGHT…   PROVIDER NAME:OTOOLE MARGIE
WRONG…   PROVIDER NAME:O TOOLE, MARGIE

RIGHT…   PROVIDER NAME:AKELSTAD MURPHY JOHN AND MARY
WRONG…   PROVIDER NAME:AKELSTAD-MURPHY, JOHN & MARY

RIGHT…   ABBREVIATED NAME:YTC
WRONG…   ABBREVIATED NAME:Y.T.C.

RIGHT...   PROVIDER NAME:CASEY FAMILY PROGRAM INC
WRONG...   PROVIDER NAME:CASEY FAMILY PROGRAM, INC.

RIGHT...   ABBREVIATED NAME:CASEY
WRONG...   ABBREVIATED NAME:C.A.S.E.Y.

4.   When a provider is a couple as with many foster or adoptive parents, always enter the mans name first (with apologies to the feminists who will suffer in their support of consistency)

RIGHT...   AKELSTAD MURPHY JOHN AND MARY
WRONG...   AKELSTAD MURPHY MARY AND JOHN

5.   LESS IS MORE when doing a name search. Enter ANDER and you will get a list that shows all the ANDERSEN, ANDERSENS, ANDERSON AND ANDERSONS. This is especially useful if you re not exactly sure how the name is spelled. It also helps in avoiding duplicate entries.